STATE OF MONTANA DEFORE THE BOARD OF PERSONNEL APPEALS

IN THE MATTER OF UNFAIR LABOR PRACTICE CHARGE NO. 19-86:

LOLO EDUCATION ASSOCIATION, MEA,

Complainant,

FINDINGS OF FACT; CONCLUSIONS OF LAW; AND RECOMMENDED ORDER

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MISSOULA COUNTY SCHOOL DISTRICT NO. 7,

Defendant.

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On September 4, 1986, the Complainant filed an unfair labor practice charge with this Board alleging the Defendant had violated Section 39-31-401(1) and (2), MCA. Specifically, the Complainant charges that Lolo Education Association President Jean Belangie-Nye was required by the School District to attend a Missoula County School District No. 7 board meeting on August 7, 1986; that upon attending that meeting she was subjected to attenuous questioning about har answers given during an interview with the news media; and that requiring her to attend the meeting, the subsequent interrogation, and the manner of the interrogation, violated the spirit of protection granted public employees.

The Defendant denied the charges, filed its answer on September 26, 1986, and requested the unfair labor practice be dismissed on the grounds there were insufficient facts to constitute an unfair labor practice.

This Board conducted an investigation in this matter and Issued an Investigation Report and Determination on October 17, 1986. The Report found probable perit for the charge and concluded that a formal hearing in the matter was appropriate.

A formal hearing in this matter was conducted January 23, 1987, in the Middle School, Lolo, Montana. The formal hearing was conducted under authority of Section 39-31-406 MCA, pursuant to ARM 24,26,682, and in accordance with the Administrative Procedure Act (Title 2, Chapter 4, MCA). The purpose of the formal theoring was to determine whether the Defendant violated Sections 39-31-401(1) and (2) MCA. The Hearing Examiner was Stan Gerke.

Emilia Loring, Attorney at Law, Great Falls, Montana, represented the Complainant. Chadwick H. Smith, Attorney at Law, Helena, Montana, represented the Defendant.

ISSUE

Whether or not requiring the union president to attend a mid-summer School Board meeting to discuss her contacts, on behalf of her membership, with the media about a matter of union and public concern, the school budget, violates Sections 39-31-401(1) and (2) MCA in that it is interference with employees in the exercise of rights guaranteed in Section 19-31-201 MCA and interference in the administration of a labor organization.

STIPULATED PACT

- The Claimant, Lolo Education Association, MEA (hereinafter the "LEA") is the duly recognized exclusive representative of the collective bargaining unit of which Jean Belangie-Nye is a number.
- The Defendant, Missoula County School District No.
 (hereinafter the "District") operates the public elementary school in Lolo, Montana.
- At all times relevant hereto Jean Belangie-Nye has been the president of the LEA.

4. In the spring of 1986, the individual teaching contracts of seventeen nontenured teachers were not renewed by the District. On July 28, 1986, the District rehired ten of the seventeen nontenured teachers.

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PINDINGS OF PACT

After a thorough review of the record, including the testinony of witnesses, the exhibits, and the post-hearing briefs, I make the following:

- 5. President Belangie-Nye did not attend the July 28, 1986, school board meeting at which the District did not rehire seven of the seventeen nontenured teachers and, as required by state law, adopted the final school District budget for the ensuing year. Teachers (LEA members) attending the July 28, 1986, school board meeting informed President Belangie-Nye of the District's action.
- 5. President Belangie-Nye contacted the news media in the Missoula area to express the LEA's concerns of the non-biring of seven teachers and the school budget. President Belangie-Nye was interviewed by one television reporter and a tape of the interview, including the comments of teacher staffing and budget concerns, was broadcast on a Missoula TV station.
- 7. Following the TV interview broadcast, the Diatrict, by registered letter dated August 1, 1986, and signed by Richard M. Heath, Superintendent, and Douglas S. Hadnot, Chairman, Lolo School Board of Trustees, informed President Belangic-Nye that she was required to attend the school board meeting of August 7, 1986, regarding her concerns of the school budget. President Belangic-Nye had never previously been invited, requested or required to attend a school board meeting in such a fashion.

- 8. By letter dated Augusti 5, 1986, addressed to Superintendent Heath, President Belangie-Nye requested a written response to the following questions regarding the letter requiring her to attend the August 7, 1986, school board meeting:
 - a) Is this a directive?
 - b) What is the purpose of my attending the board meeting?
- c) What do you expect no to present?

 President Belangie-Nyc nover received a written response to her letter.
- 9. The August 7, 1986, school board meeting agenda prepared by the District notes; III. New Business, C. Jean Belangie-Nyc Press Statement. The agenda also notes there will be "discussion" and "possible action" on the subject.
- neeting of August 7, 1986. Chairman Hadnot chaired the meeting. When the business of the mosting reached the agenda item regarding President Balangie-Nye, Chairman Hadnot prepared to show the video tape of President Balangie-Nye's TV Interview. The District had secured a copy of the TV news tape. Prior to it's playing, President Balangie-Nye verbally asked Chairman Hadnot to respond to her August 5, 1986 letter. Chairman Hadnot entered her request on the record of the school board meeting and then gave instructions to play the video tape. Pollowing the playing of the tape, President Balangia-Nye gave a presentation regarding the LEA's concerns on toacher staffing and the budget and verbal exchanges occurred between President Balangie-Nye and Chairman Hadnot.
- 11. President Belangie-Nye testified that she believed her required attendance at the August 7, 1986 school board

meeting was a reprimend for contacting the news media. She testified that she was intimidated and threatened by Chairman Hednot and she clearly understood she was not to talk with the news media in the future. Several witnesses supported Belangie-Nye's testimony.

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- 12. Chairman Hadnot testified that the real reason for President Belangie-Nye's presence at the August 7, 1986 school board meeting was to provide comments concerning the school budget. Chairman Hadnot testified that during the school board meeting President Belangie-Nye was intimidating, argumentative, hostile and rude. Several witnesses supported Chairman Hadnot's testimony.
- 13. The following are verbal exchanges that occurred between Chairman Hadnot and President Bolangie-Nye at the August 7, 1986 School Board meeting taken from the tape recording from that meeting (Joint Exhibit #5):

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            HADNOT:
                       Item C, ah, in regards. Um, basically,
                       Um, television news interview here.
18
                       wonder, I could ask John to run that for
19
            NYE:
                       Before you do ...
                       On hum...
            HADNOTE
20
            MYE:
                       I sent a letter to Dick (Richard M.
                       Heath, Superintendent) in registered
21
                       mail...
            HADNOT:
                       Um hum. . .
22
            NYE:
                       ... requesting a written response. There
                       were three requests in it. No. 1, was
23
                       this a directive that I be here; No. 2,
                       what is the purpose of this; and No. 1,
24
                       what am I to present. I requested that
                       in writing and I asked Dick this morning, when he called me, if he would
25
                       have something to that effect in writ-
26
                       Hell, um, I stopped by the school last
night to visit with Mr. Heath on my way
            HADNOTE
27
                       home from work and I watched him open
28
                       the letter last night in his office
                       here.
29
            NYE:
                       Um hum...
            HADNOT:
                       So there really was not time for any
30
                       written response to that, Therefore, he
                       I did make a telephone call to you
31
                       today.
           NYBE
                       Right.
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100	HADNOT -	AND DESCRIPTION OF THE PROPERTY OF THE PROPERT
1		Let's go whead with this since you're here
2	NYE: HADNOT:	I would like a
3 4 5	NYE:	AND SOI would like a written response to my
	HADNOTE	letter. I want that on the record
31	1100000000	Okay. Let the record show that Jean has asked for a written response to her
5		letter, John, would you like to run that for us, please.
6		(The news video tape was played.)
1000	HADNOT:	Well, Jean, since you were not at our
8		final budget hearing (pause because of video machine noise) since you were
9		not at our final budget hearing you need
30.		to have quite a bit to say about this, I wanted to give you the opportunity to
33	NYE:	tell the board the record. Ok, I have no problems with that what-
12		scever. Alice [fellow teacher] has
13		several handouts. I was not at the final budget hearing, however, like
		anyone in this room any of you can go and pick up a copy of the preliminary
14		Dudget at the County Superintendentia
15		Office. We came out here, we picked up copies of the budget also. Ah, one of
16		our very serious concerns is that, first
17		not rehired in May
18		(Major portion of Nyc's presentation omitted.)
19		In closing in terms of it I can't see
20		that a \$5,600 difference is a financial need in terms of rehiring. We also have
21		some questions that we would like to ask the board in terms of the hiring and
22	HADNOT	rehiring
	NYE:	And I have a statement that I would
23	HADNOT:	like to read. Well, I'd like to address your state-
24	100000000	ments that you make to the proce under
25		this particular agenda item. If you have a statement from the LEA it really
26		should have been presented in communica- tions under the reports that we asked
27	NVR:	for. Ah. Jean:
28	HADNOT:	This is not a statement in your comments to the press there
7.3		you said that they should have been given warning about losing jobs.
29	NYE: HADNOT:	Yes.
30		And were those people given warning at sometime earlier this year or not?
31	NYE:	They were give a termination notice saying that depending on funding cuts
32		they would not be rehired. Now

31	HADNOT:	And whom was that given?
	NYE: BADNOT:	That was given on April 15th. Okay
-	NYE;	However
2 3 4 5	HADNOT: NYE:	Thank you
140	MADNOT:	That's the end of my question
7.1	NYE:	I Dave a comment. I think
	HADNOT:	I don't think I'm going to entertain your comment.
6	NYE:	Pine.
6 7	HADNOT:	Okay, You said that you, I know there's money in that budget, and the figures
10000		that I have indicated, ah, that we have
8		budgeted minimal amounts were adequate
9		to minimal amounts in every area. And there is no padding in this budget
		Whatsoever, Now we come out with
10		\$627,000 to spend on regular teacher's
41	NYE:	Okay
12	HADNOT:	And, if we had taken into account the
-66		approximate 9% increase in teacher's salaries that is granted by the negoti-
13	200000	ated agreement, where do you promose .
14	NYE: HADNOT:	9%? that we find some other money in this
100	14 C 1 C 1 C 1 C 1 C 1 C 1 C 1 C 1 C 1 C	budget to teach on.
15	NYE; HADNOT:	It was 3.5%
16	NYE:	No, I think it's 9%Oh, I'm sorry Mr. Hadnot I negotiated
17	1040043	that agreement. It was negotiated
5.6		fairly. It was a total 0% increase over two years. Three point five percent
18		
19	HADNOT:	Jean, the figures that I have show that,
	NYEr	Your figures are wrong.
20	HADNOT:	Oh. okay. Woll then we see the
20	NYE:	this one
22	HADNOT:	this one3.5% increase That's fine. It's about \$60,000 or
-53.1	MYE:	\$70,000. Is that correct?
23	150,000,0	I haven't looked at the the negoti-
24	HADNOT	ated
25	strature 2	It's over 60 say, if it were \$68,000 and you're talking about \$680,000 for
23		teacher's salaries. What percentage is
26	NYET	that? Well, I figured it out
27	HADNOT:	About 10% tonte :-
200	NYE;	Actually, I figured it out on my calcu- lator today and they are listed at the
28		bottom of my statement, Okav.
29	HADNOT'T	Okay.
	(IMAUDIBL	Furthermore.
30	HADNOT:	You still haven't answered my question
31	300000000	in terms of where else in the budget. Where would you take money out of one
52		The second of the second of the second secon
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4		line in the budget and not it to-
		The state of the s
3	NYE:	Well, first of all when a teacher says she's not returning. No. 1, No. 2, why
		don't you hire the teacher that is 91
4 3	HADNOT:	NO.
4	NYE: HADNOT:	dollars more(INAUDIBLE)That is not the answer to my ques-
		tion. I want to know where are we noted
6		to find dollars somewhere else in the budget to move them up into the
7	NYE:	teacher's salaries?
8	4665	Okay, under preliminary budget you had a figure of \$7,790 under supplies. On
9.3		your final budget you had one of \$17,790. You added \$10,000 into the
10		general administration supplies which is the building principle area. There is
11	HADNOT:	\$10,000 right there. Okay.
12	MIEI	I have a question about that. We had under instruction your supplies went
13	HADNOT:	from \$7,000 to \$28,000.
14	NYR:	That seems to be an addition of \$21,000. Next question, \$30,000 under "other"
15		under administrative. You don't know what that's being used for a lor of
16		stuff got put in supplies. We understand that there's a certain amount
17		of padding. We are also very aware that
***		\$28,000 was transferred out of teacher's salaries last year.
18	HADNOT1	Jean, my basic question is, why, when we had three members of the staff on a
19		budget review committee that met in eve
20		pretty long meetings and we had none pretty good exchanges. Why didn't we
21		hear that them? And why did you have to go outside? Why can't you come to us
22	NVE:	and talk to un?
33.1		I don't feel I should have to answer that?
23	HADNOT:	Well, I'm asking you. I want to know why did you choose
24	NYE:	You're the one
25	HADNOTI	to take this in an arena where it does not belong?
26	NYE1	What do you mean, take it in an arena where it does not belong?
27	HADMOT:	The arona for discussing the budget is in this place where the budget in
28	NYE:	determined Yes, yesbut
29	HADNOT	and we had a meeting and a time to do that
30	MYE:	Oh, but Doctor Hadnot. Yes, we had an arena. Yes, there were staff members
31		invited. And, yes, you cut 7 positions. We have serious questions about four of
32		the positions

1	Н	ADNOT:	You are not enswering my question, Jean
2	100.00	YEr	About the positions you out
3		ADNOT:	I want to know why you didn't come and discuss it with us at the proper
4.	N	YE:	time. Because my understanding was that the
5			curriculum or the budget committee was made up of Jan. Bobbie, and Bill They
6			had the information. They presented it to you. They have comments. Maybe they
7	7.6	ADNOT:	can answer those questions
8		YE: ADNOT:	I wasn't there. Well, the final budget was adopted in an
9	8.5	ALDINO 2.1	open public meeting in this room last
10	N	YE:	A week ago Monday. That's right and that's when you also
-77		101123330	cut 7 teachers for which that shouldn't have been cut
П		ADNOT:	Why didn't we hear these comments then?
12	N	YE:	Because I didn't think you would have listened them them either.
13	H	ADNOT;	Hum, that's interesting. Well, does any other board numbers have question or
14			comments for Jean?,,,
15		Comments ember)	occurred from at least one School Board
17	31.	ADNOT:	I think the bottom line here, and the point, that I'm trying to make and it's directed at you Jean,
18	-77	YE: MDNOT:	Un humis that if we're ever going to get
19			Lola School to work together for the
20 21			we're going to have to get together and talk about it in a forum where we can
388		/R:	accomplish semething.
22	102	ADMOT:	And the kind of committee that was formed was staff members and community
23		i i	members and board members and adminis- tration and a clerk was just the kind of
24			a forum to accomplish that. And there
25			were a lot of ideas exchanged and lot of the ideas that came from the staff were
26			incorporated into the budget and that's the place to do it; But if we have
2.7		- 2	people going outside and stirring the pot and making problems it tears things
28			apart that such further. It's unneces- sary and I would ask everybody in this
29		- 3	room if you care for Lolo School and you care for the kids please help us bring
30			it together. Come and work wish us. We
31			want to do that. I'm going to call a recess for fifteen minutes and we will (INAUDIBLE).
32			Annual Control of the
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DISCUSSION

The factual situation is clear. In the spring of 1986, the District did not renew the individual teaching contracts of seventeen nontenured teachers. During the final adoption of the 1986-87 school budget conducted at a special neeting of the school board on July 28, 1986, only ten of the seventeen nontenured teachers were rehired. These actions by the District were of grave concern of the LEA.

The President of the LEA, Jean Belangie-Nye, took the LEA's concerns to the news media. A local TV station interviewed President Belangie-Nye and broadcast the video tape of that interview.

One or two days following the broadcast of the interview, the District, by registered letter, informed President Belangie-Nye that she was <u>required</u> to attend the August 7, 1986 school board meeting. Conflicting testimony was given concerning the tone of the August 7, 1986, school board meeting and the demeanor of President Belangie-Nye and Chairman Hadnot. The best evidence regarding the August 7th meeting is Joint Exhibit #5 - the tape recording of the school board meeting (note dialogue between President Belangie-Nye and Chairman Hadnot in Findings of Pact No. 13).

The preponderance of the evidence persuades me to conclude that the District's purpose of requiring President Belangie-Nys attendance at the August 7th school board meeting was to quastion her action of giving a statement to the media and to discourage further press statements. I am not persuaded by Defendant's argument that President Belangie-Nys was invited to attend the meeting for the sole

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reason to share her budget concerns. I thoroughly considered the following facts in my conclusion:

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- a) President Belangie-Nye was required to attend the August 7th meeting by registered letter,
- President Belangie-Nye had never been previously invited, requested or required to attend a school board meeting in such a fashion.
- c) The final budget for the 1986-87 school year was adopted July 28, 1986, at a special meeting of the school board. Formally addressing President Balangie-Nye's budget concerns some ten days after the adoption of the final budget lacks sensibility.
- dl The prepared agenda for the August 7th school board meeting lists "Jean Belangie-Nye Press Statement" and "discussion and possible action."
- e) The thrust of Chairman Hadnot's questions and comments at the August 7th meeting were concerned with President Belangie-Nye's action of "going to the press" rather than her budget comments.
- f) The playing of the video tape of President Belangic-Nye's press statement at the August 7th meeting indicates concern in her contecting the news media rather than her budget comments.

Complainant LEA charged that Defendant District violated Sections 39-31-401(1) and (2) MCA. Those statutes read as follows:

*39-31-401. Unfair labor practices of public employer. It is an unfair labor practice for a public employer to:

- interfere with, restrain, or coerce employees in the exercise of the rights guaranteed in 39-31-201;
- (2) dominate, interfere, or assist in the formation or administration of any labor organization; however, subject to rules adopted by the board under 39-31-401, an employer is not prohibited from permitting employees to confer with him during working hours without loss of time or pay;"
- "39-31-201. Public employees protected in right of self-organization. Public employees shall have and shall be protected in the exercise of the right of self-organization, to form, join, or assist any labor organization, to bargain

collectively through representatives of their own choosing on questions of wages, hours, fringe benefits, and other conditions of employment, and to engage in other concerted activities for the purpose of collective bargaining or other mutual aid or protection free from interference, restraint, or poercion."

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I have already concluded that the District's purpose of requiring President Belangie-Nye ito attend the August 7, 1986 school board meeting was to question her action of giving a press statement concerning the school budget and staffing and to discourage President Balangie-Nye to give future press statements. To be determined is whether that action by the District constitutes a 401(1) violation in that it has interfered with protected rights afforded employees under the Act. I do not have sufficient facts to address a 401(2) violation.

An employer was not justified in discharging six employees for distributing leaflets publicizing a union's dispute with the employer because employees were engaged in protected concerted activity and their conduct did not

constitute disloyalty. NLRB v. National Furniture Mfg. Co., 1 315 F.2d 280 (7th Cir. 1963), 52 LRRM 2451. Nurses' 2 statements on television news broadcast protesting wages and 3 staffing conditions at a hospital were found to be protected 4 activities despite the employer's contention that remarks 5 were disloyal and disparaging against employer. Rosnoke 6 Hospital v. NLRB, 538 P.2d 607, (4th Cir. 1976), 92 LRRM 7 3158. Employees distribution of union newsletter waging В opposition of right-to-work statute and criticizing 9 presidential veto of minimum wage increase was found to be 10 protected concerted activity and employer's attempt to bar such distribution was unlawful. Eastex, Inc. v. NLRB, 437 U.S. 556, 98 LRHM 2717 (1978). Suspension was held unlawful of two bus drivers for issuing press release announcing intent of bus drivers to strictly obey speed limit over Labor Day weekend; the press release was related to ongoing labor dispute between employees and employer and such communication was protested. NLRB v. Greybound Lines, Inc., 660 F.2d 354 (8th Cir. 1981), 108 LRRM 2531, In summary, employees' activities which are directed to improve terms and conditions of employment or otherwise improve their lot as employees are protected oven though such activities are channeled outside immediate employee-employer relationships. Rastex, Inc. v. NLRB, supra; NLRB v. Washington Aluminum Co., 370 U.S. 9, 50 LRRM 2235 (1962); NLRB v. Electrical Morkers (IBEW) Local 1229, 346 U.S. 464, 33 LRRM 2183 [19535]

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As noted earlier, insufficient evidence was produced to show a violation of Section 39-31-401(2) MCA. Violations of 401(2) [equivalent to Section 158(a)(2) of the federal statutes) relate to employer domination or interference with

or support to a "labor organization" as opposed to protected concerted activities of individuals in 401(1) violations.

I have found a violation of Section 39-31-401(1) MCA. However, 401(1) (equivalent to Section 158(a)(1) of the federal statutes) "was intended as a general definition of employer's unfair labor practices. Violations of it may be either derivative, independent, or both." <u>Pun Stridars, Inc. v. NLRB</u>, (9th Cir. 1981), 686 F.2d 659, 106 LRRM 3076.

Missoula County High School District v. Board of Personnel Appeals, et al., _____ Hont. _____, 727 P.2d 1327, d3 St.

Rptr 2808, 5 St.Rptr Ed. L. 200 (1986), sets forth the test to determine whether there was an independent or a derivative violation of Section 39-31-401(1) MCA:

- that employees are engaged in protected activities;
- (2) that the employer's conduct tends to interfere with, restrain, or coerce employees "In those activities"; and,
- (2) that the employer's conduct is not justified by a legitimate and substantial business reason.

I have determined that President Belangie-Nye was engaged in protected activities and that the District had Interfered with those activities. Parts (1) and (2) of the test have been satisfied. The District had argued that President Belangie-Nye was invited to the August 7th school board meeting to show her school budget views. However, the final school budget was adopted at a special meeting of the school board on July 28th. I do not find that requiring President Belangie-Nye to make school budget comments after final adoption of the budget justifies a "legitimate and substantial" business reason. Therefore, there is an independent violation of Section 39-31-401(1) MCA.

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RESILTON

Defendant's Motion to Dismiss Unfair Labor Practice Charge No. 19-86 as it pertains to Section 39-31-401(1) MCA is hereby denied. Defendant's Motion to Dismiss the charge as it pertains to Section 39-31-401(2) MCA is hereby granted.

CONCLUSIONS OF LAW

Defendant, Missoula County School District No. 7, has violated Section 39-31-401(1) MCA.

RECOMMENDED ORDER

TT IS ORDERED that Missoula County School District No.

7 will cease and desist from interfering with individual teachers who engage channels outside the immediate employer-employee relationship in matters of improving conditions of employment.

SPECIAL NOTE

In accordance with Board's Bule ARM 24,25.107(2), the above RECOMMENDED ORDER shall become the FINAL ORDER of this Board unless written exceptions are filed within 20 days after service of these FINDINGS OF PACT, CONCLUSIONS OF LAW, AND RECOMMENDED ORDER upon the parties.

DATED this 5th day of May, 1987.

BOARD OF PERSONNEL APPRAIS

Byi

Stan Gerke

Hearing Examiner

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